

# Managing the Size of your Outlook Mailbox – CSI Montana

*The following techniques can help you organize your Outlook items so that you stay under your quota and you can still save all the messages and attachments that you really need.*

## What is the Outlook Quota?

The Outlook quota applies to the Outlook items such as messages, attachments, appointments, tasks, etc., that are in your mailbox on the Microsoft Exchange server. It does not apply to any personal folders or archive folders (.pst files).

The standard size limit for State of Montana Outlook mailboxes is 50 megabytes (MB).

- At 45 MB, a warning message is sent from the System Administrator.
- At 50 MB, you can no longer send or receive email.

### Is a quota increase possible?

Usually, mailbox management techniques are successful and Outlook quota increases are not necessary. Please implement all the mailbox management techniques before requesting a quota increase. In some special circumstances a quota increase is approved.

### What is taking up all that space?

In Outlook, in the Folder List, right-click on your Mailbox and click Properties. Click on the Folder Size button to view your current mailbox size. You can go through this same procedure on each sub folder or item to figure out where all of the space is being used,

The size is listed in kilobytes (KB). 1000 KB is 1 MB. Make a note of:

- folders that you do not use
- folders that seem exceptionally large
- the size of your Deleted Items folder
- the size of your Sent Items folder

After noting folders to examine further, return to your Inbox.

# Take Action

Solving the problem involves a combination of deleting files and moving files to other “information stores,” either personal folders or archive folders.

## Delete Unneeded Items – but learn to identify “what is a public record” first

- If your Deleted Items folder was not empty, right click on your Deleted Items folder and select “Empty Deleted Items Folder.”
- Based on the notes taken during your folder size inspection, examine any large folders, or folders that are not currently in use:
  - Delete messages and folders that you no longer need by selecting them and clicking the Delete button on the toolbar.
  - Delete attachments that are no longer needed by right-clicking the attachment and choosing Remove. You can first save attachments to your local hard drive or a network drive by opening the message and choosing File, Save Attachments.
  - Click the Received column header to sort by Received Date. Check the oldest messages to see if they can be deleted.
- Identify large files in your mailbox by sorting the size column – just click on the size box at the top.
- Empty the Deleted Items folder to remove the deleted items from your mailbox and your Outlook quota.

## Move Items out of your Mailbox

After you delete unneeded files, you can move items to “personal folders” or “archive folders” where you can still access the information but the items do not count against your Outlook quota.

### Types of Outlook Folders

There are three major types of Outlook folders described below: Mailbox folders, Personal folders and Public folders.

Mailbox folders are folders within your Outlook mailbox used to organize your Outlook items. They can be accessed by you and by anyone to whom you give permission.

- Mailbox folders count in your Outlook file space quota. These include your Inbox, Sent Items, Deleted Items and any folders you create
- Mailbox folders are available to you whenever you open your mailbox, including when you use Outlook Web Access.

Personal Folders contain Outlook items but are stored on your local hard drive or on your network space, for example, on your W:\ drive, and not on the Exchange Server. For CSI purposes we always want them to be on the W: drive, so they will be backed up. Personal

folders are well suited to store data that you need to access from your office workstation but not from home or when you are traveling. They are excellent for long-term archival-type storage.

- personal folder space does not count against your Outlook file space quota
  - personal folders are only available when you have access to the location where they are stored. They will not be available using Outlook Web Access or from your home computer.
  - personal folders can be added to and removed from your Outlook folder list so that items stored in them are readily available
  - Outlook archive files are a type of personal folder created using the Outlook Archive feature
  - personal folders and archive folders end with a .pst file extension; search for \*.pst to locate personal and archive folders
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- public folders are located at the bottom of the Outlook Folder List
  - public folders can be made "visible" only to selected individuals or groups
  - public folder space does not count against your Outlook file space quota
  - public folders are available to you whenever you open your mailbox, including when you use Outlook Web Access.

### **Creating a Personal Folder**

To move items from your Outlook mailbox into a personal folder, first create a personal folder:

1. Go to Tools, E-mail Accounts
2. Choose View or Change Existing E-mail accounts, then click Next.
3. Choose New Outlook Data File. A personal folder file will be the only option. Click OK.
4. Choose a location and name for the file then click OK (it should be on your W: drive).
5. Click OK again to return to the E-mail accounts window
6. Click Finish to return to the Inbox.

The new Personal Folder will be displayed in your folder list. You can move messages or folders from your Outlook space to your network drive simply by dragging them from the Information Viewer onto the folder. You can add to the Personal Folder at any time in the future.

The Outlook items in the Personal Folder are available to you only when the network drive is available to you. If you use Outlook from another computer or Outlook Web Access, items in a Personal Folder are not available.

### **Adding A Personal Folder to Your Folder List**

If your personal folder or archive folder does not appear in your folder list, it can be added in the same way it was created except that instead of typing in a name for the folder, you select the

existing personal folder or archive folder. This will be necessary if you create a new Outlook profile or if you get a new computer.

To locate personal folders and archive folders, search for files that end with .pst:

1. Choose Start, then Search
2. Select for Files or Folders
3. Specify the drive to search, i.e., W: and click Search Now
4. Make a note of the location, then use the instructions for Creating a Personal Folder (above) to add the folder to your Outlook Folder List.

### **Archiving Outlook Items**

Outlook's Archive feature moves groups of files based on the “modified date” from your Outlook Mailbox to an archive file on your local hard drive or network drive. This feature is designed for files which you do not use regularly but that you do not want to delete and may need in the future. It is an excellent way to clean up your Outlook mailbox at the end of a quarter or the end of a year. Some benefits of archiving include:

- Contents of archive files do not count against your Outlook quota
- You can add to the archive file
- Your existing folder structure is maintained in your new archive file
- Archive items can be available to you in Outlook if you add them to your Folder List
- You can archive manually anytime you wish
- You can set AutoArchive to archive automatically at timed intervals

### **Manual Archive**

To manually archive Outlook items:

1. Choose File, Archive.
2. Select Archive this folder and all subfolders.
3. Select the folder or folders that you wish to archive.
4. Use the Archive items older than box to select the Outlook items to archive.
5. Set the file name and location, for example, W:\Robert Moon\archive.pst
6. Click OK to begin the archive process. You can add to the archive with subsequent archive commands.

## **Organize for Future Easy Maintenance**

### **Add the Size field to your Inbox**

Seeing the size of each message as it is received may help you to delete large messages or move them to a personal folder before you are over quota. You can also click the Size column to sort by size so that your largest messages are displayed together. To add a Size field to your Inbox:

- With your Inbox active, right-click on any Inbox column heading.
- Select Field Chooser.
- Drag the Size field onto the Inbox column heading list

## **Empty Deleted Items Automatically**

To make sure that your Deleted Items are emptied each time you exit Outlook:

- Choose Tools, Options, then click the Other tab.
- Verify that Empty the Deleted Items folder upon exiting is checked.

## **Recover deleted items or folders**

To give you more confidence to delete items, it is good to know that Deleted Items can be recovered for several days. So, when in doubt, delete. To recover recently deleted items:

- Click the Deleted Items folder to select it.
- On the Tools menu, click Recover Deleted Items.
- Select the item or folder you want to retrieve from those displayed, and then click Recover Selected Items. The item will be returned to your Deleted Items folder.

## **Use Rules to move files automatically**

You can use rules to send messages to folders automatically. Sending routine messages, such as NewsLinks messages, to a personal folder can minimize messages in your mailbox. To create a rule, choose Tools, Rules Wizard and follow the prompts. Rules to Personal Folders are client-only rules because you must be logged in with the personal folders available.

## **Use Personal Folders**

Keep a personal folder listed in your folder list to make it easy to move files from your Outlook Mailbox to the personal folder. Follow the instructions above [to add a personal folder to your folder list](#).

## **Archive Your Outlook Items**

Archive your Outlook mailbox on a regular basis to move files from your Outlook mailbox to the archive folder. Use the File, Archive command to manually control over which folders are archived. Use the AutoArchive feature to automatically move files in specified folders to the archive folder.

# AutoArchive

The AutoArchive feature automatically moves or deletes items in specific folders whose Modify date is prior to the specified archive date. (The Modify date is not the same as the Received date that is displayed by default.) You can automatically archive individual folders, groups of folders, or all Outlook folders. The process runs automatically whenever you start Outlook. The AutoArchive properties of each folder are checked by date, and old items are moved to your archive file. Items in the Deleted Items folder are deleted. AutoArchive is a two-step process.

- Configure AutoArchive by choosing Tools, Options, Other tab, and then click AutoArchive.
- Set the AutoArchive properties for each folder that you want archived.

Good luck staying within your Outlook quota!